

KEY INFORMATION SUMMARY SHEET

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT



Request for Proposals No. # S00R0400012 Maryland CDBG Guidebook

Procurement Officer: Ann Goldman
410-514-7113
(FAX) 410-987-4676
goldmana@mdhousing.org

Submit Proposals to: Department of Housing and Community Development
Attention: Ann Goldman
100 Community Place
Crownsville, Maryland 21032-2023

For directions, click on the DHCD website:
<http://www.mdhousing.org/Website/About/Directions.aspx>

Solicitation Issue Date: March 18, 2010

Pre-Proposal Conference: March 30, 2010 11:00 a.m. local time

Closing Date and Time: April 20, 2010, 2:00 pm local time

Anticipated Contract Start: May 2010

NOTICE

Prospective Offerors who have received this document from a source other than the Issuing Office should immediately contact the Issuing Office and provide their name and mailing address so that any amendments to the RFP and other communications may be sent to them.

Minority Business Enterprises and Small Businesses are encouraged to respond to this solicitation

**STATE OF MARYLAND
NOTICE TO VENDORS/CONTRACTORS**

To help us improve the quality of State solicitations, and to make our procurement process more responsive and business friendly, we ask that you take a few minutes to provide comments and suggestions regarding the enclosed solicitation. Please return your comments with your bid/proposal or, if you have chosen not to respond, fax the completed form to 410-987-4676.

1. If you have responded with a "no bid" please indicate the reasons below:

- ☐ Other commitments preclude our participation at this time.
- ☐ The subject of the Contract is not something we normally provide.
- ☐ We are inexperienced in the work/commodities required.
- ☐ Specifications are unclear, too restrictive, etc. (Please Explain in Remarks Section)
- ☐ The scope of work is beyond our current capacity.
- ☐ Doing business with Government is simply too complicated. (Please Explain in Remarks Section)
- ☐ We cannot be competitive. (Explain in Remarks Section)
- ☐ Time allotted for bid/proposal is insufficient.
- ☐ Start-up time is insufficient.
- ☐ Bonding/Insurance requirements are prohibitive. (Explain in Remarks Section)
- ☐ Bid/Proposal requirements (other than specifications) are unreasonable or too risky. (Explain in Remarks Section)
- ☐ MBE requirements (Explain in REMARKS section)
- ☐ Prior experience with State of Maryland contracts was unprofitable or otherwise unsatisfactory. (Explain in Remarks Section)
- ☐ Payment schedule is too slow.
- ☐ Other: _____

2. If you have submitted a bid or proposal, but wish to offer suggestions or express concerns, please use the Remarks section below. (Use reverse or attach additional pages as needed.)

REMARKS: _____

Vendor Name: _____ Date _____

Contact Person: _____ Phone _____

Address: _____

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ATTACHMENTS:

- A. Contract Terms**
- B. Bid/Proposal Affidavit**
- C. Contract Affidavit**
- D. Minority Business Enterprise Participation**
- E. Living Wage Attachment**
- E-1 Living Wage Affidavit**
- F. Price Proposal Form**

EXHIBIT

Keys to Success: A Guidebook for the Maryland Community Development Block Grant Program – Access via link to DHCD Procurement Web Page:

<http://www.dhcd.state.md.us/Website/Procure/Default.aspx>

SECTION 1. PROPOSAL INFORMATION

1.1 PURPOSE

The Maryland Department of Housing and Community Development (DHCD), a principal department of the State of Maryland (State), is issuing this Request for Proposals (RFP) seeking proposals from offerors to update and publish *Keys to Success: A Guidebook for the Maryland Community Development Block Grant Program* (the Guidebook), which is a basic, “user-friendly” road map for the State Community Development Block Grant (CDBG) program. Specific qualifications and services to be provided are outlined in Section 4 of this RFP.

1.2 ISSUING OFFICE AND PROCUREMENT OFFICER

The sole point of contact in the State for purposes of this Request for Proposals (RFP) is the Procurement Officer at the Issuing Office address listed below:

Ann Goldman
Department of Housing and Community Development
100 Community Place, Room 2.613A
Crownsville, Maryland 21032-2023
Telephone: 410-514-7113
Fax: 410-987-4676
E-mail: goldmana@mdhousing.org

This RFP is also available on DHCD’s website in PDF format:
<http://www.dhcd.state.md.us/Website/procure/procure.aspx>.

1.3 PROCUREMENT METHOD

This Contract will be awarded in accordance with the competitive sealed proposals process under COMAR 21.05.03.

1.4 QUESTIONS AND PRE-PROPOSAL CONFERENCE

Questions will be accepted from prospective Offerors and should be submitted in a timely manner to the Procurement Officer only. E-mail submission of questions is preferable, but questions will also be accepted by mail or facsimile to the Procurement Officer.

The Procurement Officer will decide whether an answer can be given before the closing date, based on the availability of time to research and communicate an answer. Answers to all substantive questions that have not previously been answered, and are not clearly specific only to the requestor, will be distributed to all offerors who are known to have received a copy of this RFP.

A pre-proposal conference will be held at DHCD, 100 Community Place, Crownsville, Maryland 21032 at the date and time listed on the Key Information Summary Sheet. While attendance at the pre-proposal conference is not mandatory, information discussed may be significant. Therefore, all interested parties are encouraged to attend in order to better prepare proposals. In addition, attendance may facilitate the offeror's understanding and ability to meet the established MBE goal.

1.5 PROPOSAL SUBMISSION REQUIREMENTS AND DEADLINE

The following proposal submissions must be received at the Issuing Office no later than the date and time listed on the Key Information Summary Sheet, in order to be considered, except as provided in COMAR 21.05.02.10:

1. An unbound, clearly marked original and three (3) additional hardcopies of the Technical Proposal, in a separate sealed envelope marked "Maryland CDBG Guidebook – Technical Proposal;"
2. An electronic version of the Technical Proposal in MS Word or PDF, submitted on a CD with a label on the outside that indicates the RFP number and title; and
3. A clearly marked original and three (3) additional hardcopies of the Price Proposal in a separate sealed envelope marked "Maryland CDBG Guidebook – Price Proposal." The original shall be clearly identified and shall bear the original signature of the individual authorized to commit the firm.

Requests for an extension of this date or time will not be granted. Offerors mailing proposals should allow sufficient mail delivery time to ensure timely receipt at the Issuing Office. Proposals submitted by e-mail or facsimile will not be accepted. Opened proposals will not be returned to Offerors.

1.6 MULTIPLE OR ALTERNATE PROPOSALS

Neither multiple nor alternate proposals will be accepted.

1.7 DURATION OF OFFER

Proposals submitted in response to this RFP are irrevocable for a period of one hundred twenty (120) days following the closing date. This period may be extended at the Procurement Officer's request only with the Offeror's written agreement.

1.8 MANDATORY CONTRACTUAL TERMS

By submitting a proposal in response to this RFP, an Offeror, if selected for award, shall be deemed to have accepted the terms of this RFP and the standard contract terms and conditions,

included as Attachment A. Any exceptions to this RFP, or Attachment A attached, must be clearly identified in the Executive Summary submitted with the Technical Proposal. A proposal that takes exception to these terms may not be reasonably susceptible of being selected for award.

1.9 INCORPORATION OF RFP AND PROPOSAL

The applicable sections of this RFP and the successful Offeror's proposal shall be incorporated into the resulting contract.

1.10 BID/PROPOSAL AFFIDAVIT AND RESIDENT AGENT

Offerors must submit a completed Bid/Proposal Affidavit, Attachment B, with their Technical Proposal. If an item on this Affidavit is not applicable, please indicate so. All blanks are to either contain an answer or a Not Applicable designation.

Additionally, in order to legally conduct business within the State of Maryland, all corporate entities must appoint and maintain a Resident Agent who receives legal process and other communications on behalf of the entity.

The failure to register and designate a Resident Agent may foreclose or hinder the company's ability to legally enter into contracts and gain access to the state courts. Moreover, it may subject the company to monetary, civil, and possibly criminal sanctions. Also, failure to maintain a Resident Agent may cause your company to fall out of "good standing" within the State. This will subject your license to do business within the State to forfeiture, with monetary penalties assessed to reinstate your company to a "good standing."

1.11 CONTRACT AFFIDAVIT

All Offerors are advised that if a contract is awarded as a result of this solicitation, the successful Offeror will be required to complete and submit to the Procurement Officer a Contract Affidavit confirming that all statements made on the Bid/Proposal Affidavit (Attachment B) remain true and correct in all respects as of the date of the Contract. A copy of this Affidavit is included for informational purposes as Attachment C of this RFP.

1.12 CONFLICT OF INTEREST

The Offeror shall consider and resolve any potential conflicts of interest which presently exist or which may arise if the Offeror were to be awarded this Contract.

1.13 REVISIONS TO THE RFP

If it becomes necessary to revise this RFP, amendments will be provided to all prospective Offerors that were sent this RFP or otherwise are known by the Procurement Officer to have

obtained this RFP. Failure to acknowledge receipt does not relieve the Offeror from complying with all terms of any such amendment.

1.14 RFP CANCELLATION / REJECTION

The State reserves the right to cancel this RFP at any time prior to contract award pursuant to COMAR 21.06.02.02. The State also reserves the right to accept or reject any and all proposals, in whole or in part, received in response to this RFP and to waive or permit cure of minor irregularities in any manner necessary to serve the best interests of the State of Maryland. Offerors whose proposals are not accepted will be notified in writing.

1.15 INCURRED EXPENSES

The State will not be responsible for any costs incurred by an Offeror in preparing and submitting a proposal or in performing any other activities relative to this solicitation.

1.16 ECONOMY OF PREPARATION

Proposals should be prepared simply and economically, providing a straightforward, concise description of the Offeror's ability to meet the requirements of this RFP.

1.17 PROTESTS/DISPUTES

Any protests or disputes related respectively to this solicitation or the resulting Contract shall be subject to the provisions of COMAR 21.10, Administrative and Civil Remedies.

1.18 USE OF EMARYLAND MARKETPLACE

e-Maryland Marketplace is an electronic commerce system administered by the Maryland Department of General Services. In addition to using the DHCD web site (www.mdhousing.org) and other means for transmitting the RFP and associated materials, the solicitation and minutes of the pre-bid/proposal conference, Offeror questions and DHCD responses, addenda, and other solicitation related information may be provided via e-Maryland Marketplace.

This means that all such information is immediately available to organizations that subscribe to e-Maryland Marketplace. Because of the instant access afforded by e-Maryland Marketplace, it is recommended that all Offerors interested in doing business with Maryland State agencies subscribe to e-Maryland Marketplace, free of charge.

1.19 MINORITY BUSINESS ENTERPRISES (MBE)

- A. A Minority Business Enterprise (MBE) subcontractor participation goal of 25% has been established for this procurement. The successful Offeror shall structure its subcontracts in a good-faith effort to achieve that goal using businesses certified by the State of Maryland as minority owned and controlled. During the term of the Contract, the successful Offeror is

prohibited from changing the Minority Enterprise Utilization Plan as submitted (per Section 1.19 B below) without the prior written consent of DHCD.

- B. MBE requirements are specified in Attachment D of this RFP. Subcontractors used to meet the MBE goal in this RFP shall be identified using Attachments D-1 and D-2, which **must** be completed, signed and submitted with each bid or proposal. **Bids or proposals submitted without these attachments completed and fully executed shall be deemed not responsible and not reasonably susceptible of being selected for award.**
- C. A current directory of MBEs is available through the Maryland State Department of Transportation, Office of Minority Business Enterprise, P. O. Box 8755, B.W.I. Airport, Maryland 21240-0755; phone number is 410-865-1244. The directory is also available at <http://www.mdot.state.md.us>; select the *MBE Program* label. The most current and up-to-date information on MBEs is available via the website.
- D. Minority Business Enterprises are encouraged to respond to this solicitation as prime contractors. MBE vendors are encouraged to obtain MBE certification from the Maryland Department of Transportation, Office of Minority Business Enterprise. Direct all certification-related questions to:

Office of Minority Business Enterprise
Maryland Department of Transportation
P.O. Box 8755
BWI Airport, Maryland 21240-0755
(410) 859-7328
http://www.mdot.state.md.us/MBE_Program/
- E. Maryland-certified minority contractors shall include the certification number on the Price Proposal. Prime contractors who are themselves MBE-certified must meet the MBE subcontract participation goal.
- F. By its response to this solicitation, the Offeror acknowledges the MBE subcontract participation goal and affirms that the approved MBE participation level is a contract deliverable to be performed by one or more certified MBEs. During the term of the contract, the successful Offeror shall comply with the Minority Enterprise Utilization Plan described in Attachment D.

1.20 ACCESS TO PUBLIC RECORDS ACT NOTICE

Offerors should give specific attention to the clear identification of those portions of their proposal that are considered confidential, proprietary commercial information or trade secrets, and provide justification why such materials, upon request, should not be disclosed by the State under the Access to Public Records Act, Title 10, Subtitle 6, of the State Government Article of the Annotated Code of Maryland. This information is to be placed after the Title Page and before the Table of Contents of the respective proposal to facilitate public inspection of the non-

confidential portion of the proposal. Respondents are advised that, upon request for this information from a third party, DHCD is required to make an independent determination whether the information may be disclosed (see COMAR 21.05.08.01).

1.21 ARREARAGES

By submitting a response to this solicitation, each Offeror represents that it is not in arrears in the payment of any obligations due and owing the State of Maryland. This includes the payment of taxes and employee benefits. The Offeror shall not become so in arrears during the term of the Contract if selected for contract award.

1.22 VERIFICATION OF REGISTRATION AND TAX PAYMENT

Before a corporation can do business in the State of Maryland it must be registered with the Department of Assessments and Taxation, State Office Building, Room 803, 301 West Preston Street, Baltimore, Maryland 21201. It is strongly recommended that any potential Offeror complete registration prior to the due date for receipt of proposals. An Offeror's failure to complete registration with the Department of Assessments and Taxation may disqualify an otherwise successful Offeror from final consideration and recommendation for contract award.

1.23 RECIPROCAL PREFERENCE

The provisions of State Finance and Procurement Article Section 14-401 and COMAR 21.05.01.04 shall apply to this solicitation. If applicable, a nonresident Offeror submitting an offer for this solicitation shall attach to the offer a copy of the current statute, resolution, policy, procedure, or executive order of the resident state for the nonresident Offeror that pertains to that state's treatment of nonresident Offerors for similar services. A preference shall be identical to the preference that the other state gives to its residents.

1.24 FALSE STATEMENTS

Offerors are advised that section 11-205.1 of the State Finance and Procurement Article of the Annotated Code of Maryland provides as follows:

- A. In connection with a procurement contract a person may not willfully:
 - (1) falsify, conceal, or suppress a material fact by any scheme or device;
 - (2) make a false or fraudulent statement or representation of a material fact;
 - (3) use a false writing or document that contains a false or fraudulent statement or entry of a material fact.
- B. Aiding or conspiring with others – A person may not aid or conspire with another person to commit an act under subsection (A) of this section.
- C. Penalty – A person who violates any provision of this section is guilty of a felony and on conviction is subject to a fine not exceeding \$20,000 or imprisonment not exceeding 5 years or both.

1.25 ELECTRONIC FUNDS TRANSFER

By submitting a response to this solicitation, the Offeror agrees to accept payments by electronic funds transfer unless the State Comptroller's Office grants an exemption. The selected Offeror shall register using the COT/GAD X-10 Vendor Electronic Funds (EFT) Registration Request Form. Any request for exemption must be submitted to the State Comptroller's Office for approval at the address specified on the COT/GAD X-10 form and must include the business identification information as stated on the form and include the reason for the exemption. The COT/GAC X-10 Vendor Electronic Funds Registration Request Form may be downloaded from: <http://compnet.comp.state.md.us/gad/pdf/GADX-10.pdf>.

1.26 SMALL BUSINESSES

Although this is not a Small Business Reserve procurement, small businesses are encouraged to respond to this solicitation and to register with the Maryland Department of General Services for the Maryland Small Business Reserve Program through a self-certification process at <https://www.smallbusinessreserve.maryland.gov/registration/>.

A "Small Business" is defined as a business, other than a broker, that meets the following criteria:

- The business is independently owned and operated;
- The business is not a subsidiary of another business;
- The business is not dominant in its field of operation;
- The wholesale operations of the business did not employ more than 50 persons, and the gross sales of the business did not exceed an average of \$2,000,000 in its most recently completed 3 fiscal years;
- The retail operations of the business did not employ more than 25 persons, and the gross sales of the business did not exceed an average of \$2,000,000 in its most recently completed 3 fiscal years;
- The manufacturing operations of the business did not employ more than 100 persons, and the gross sales of the business did not exceed an average of \$2,000,000 in its most recently completed 3 fiscal years;
- The service operations of the business did not employ more than 100 persons, and the gross sales of the business did not exceed an average of \$2,000,000 in its most recently completed 3 fiscal years; and
- The construction operations of the business did not employ more than 50 persons, and the gross sales of the business did not exceed an average of \$7,000,000 in its most recently completed 3 fiscal years.

If a business has not existed for three years, the gross sales average is computed for the period of the business's existence. For newly formed businesses the determination will be based upon employment levels and projected gross sales.

A Small Business is not the same as a Minority Business Enterprise, but a business can be both if it has been certified by the Maryland Department of General Services as a Small Business and has been certified by the Maryland Department of Transportation Minority Business Enterprise Program as a Minority Business Enterprise.

SECTION 2. CONTRACT INFORMATION

2.1 PARTIES TO THE CONTRACT

The contract entered into as a result of the response to this RFP shall be by and between the successful Offeror as Contractor and DHCD, and shall include the terms and conditions of Attachment A of this RFP and generally the provisions of this RFP. Any exceptions must be clearly identified in the Executive Summary section of the Technical Proposal. Attachment A is included for information only and is not to be submitted with the Offeror's proposal.

2.2 CONTRACT TERM

The contract resulting from this RFP shall commence after all appropriate State approvals have been obtained, on or about May 14, 2010, and shall extend for a period of one (1) year.

2.3 CONTRACT TYPE

The Contract awarded as a result of this solicitation shall be a fixed price contract per COMAR 21.06.03.02.A (1).

2.4 COMPENSATION AND METHOD OF PAYMENT

The Contractor shall be compensated as follows:

- 1/3 of the total price of the Contract, at the price reflected in the Contractor's Price Proposal, Attachment F, upon completion of staff interviews, review of appropriate updates and revisions, and submission to and approval by DHCD of the list of recommended changes/updates to the current Guidebook, per Section 4.2 C (1), (2), and (3).
- 1/3 of the total price of the Contract, at the price reflected in the Contractor's Price Proposal, Attachment F, upon submission to and approval by DHCD of the draft revised Guidebook, per Section 4.2 C (4).
- 1/3 of the total price of the Contract, at the price reflected in the Contractor's Price Proposal, Attachment F, upon delivery to and acceptance by DHCD of 150 hardcopies and one electronic copy of the final approved version of the revised Guidebook, per Section 4.2 D (1) and (2).

The Contractor shall include on the face of all invoices its Taxpayer Identification Number, which is the Social Security Number for individuals and sole proprietors and the Federal

Employer Identification Number for all other types of organizations, and. submit each invoice to the DHCD Contract Manager for review and approval.

2.5 SCOPE OF CONTRACT

Work to be performed and the services to be provided by the Contractor will consist of the items described in Section 4 of this RFP.

2.6 CONTRACTOR RESPONSIBILITIES

The Contractor will assume sole responsibility for all work to be performed under their Contract and will be the sole point of contact for DHCD with regard to contractual matters.

2.7 WORK PRODUCTS

All products, including work papers, draft documents, notes, calculations and all other written materials regarding the engagements prepared under the terms of this contract are the property of the State of Maryland, and shall be delivered at the end of the contract in a form useable to DHCD.

2.8 INDEMNIFICATION

The Contractor agrees to indemnify and hold harmless DHCD and the State from all liability which may hereafter be incurred by reason of dissemination, publication, distribution, or circulation in any manner whatsoever of any information, data, or records pertaining in any way to the contract by the Contractor and its employees.

2.9 COMMERCIAL NONDISCRIMINATION

As a condition of entering into this Agreement, Contractor represents and warrants that it will comply with the State's Commercial Nondiscrimination Policy, as described under Title 19 of the State Finance and Procurement Article of the Annotated Code of Maryland. As part of such compliance, Contractor may not discriminate on the basis of race, color, religion, ancestry or national origin, sex, age, marital status, sexual orientation, or on the basis of disability or other unlawful forms of discrimination in the solicitation, selection, hiring, or commercial treatment of subcontractors, vendors, suppliers, or commercial customers, nor shall Contractor retaliate against any person for reporting instances of such discrimination. Contractor shall provide equal opportunity for subcontractors, vendors, and suppliers to participate in all of its public sector and private sector subcontracting and supply opportunities, provided that this clause does not prohibit or limit lawful efforts to remedy the effects of marketplace discrimination that have occurred or are occurring in the marketplace. Contractor understands that a material violation of this clause shall be considered a material breach of this Agreement and may result in termination of this Agreement, disqualification of Contractor from participating in State contracts, or other sanctions. This clause is not enforceable by or for the benefit of, and creates no obligation to, any third party.

As a condition of entering into this Agreement, upon the Maryland Human Relations Commission's request, and only after the filing of a complaint against Contractor under Title 19 of the State Finance and Procurement Article, as amended from time to time, Contractor agrees to provide within 60 days after the request a complete list of the names of all subcontractors, vendors, and suppliers that Contractor has used in the past 4 years on any of its contracts that were undertaken within the state of Maryland, including the total dollar amount paid by Contractor on each subcontract or supply contract. Contractor further agrees to cooperate in any investigation conducted by the State pursuant to the State's Commercial Nondiscrimination Policy as set forth under Title 19 of the State Finance and Procurement Article of the Annotated Code of Maryland, and to provide any documents relevant to any investigation that is requested by the State. Contractor understands that violation of this clause is a material breach of this Agreement and may result in contract termination, disqualification by the State from participating in State contracts, and other sanctions.

2.10 LIVING WAGE REQUIREMENTS

A solicitation for services under a State contract valued at \$100,000 or more may be subject to Title 18, State Finance and Procurement (SFP) Article, Annotated Code of Maryland. Additional information regarding the State's Living Wage requirement is contained in this solicitation (see Attachment E entitled Living Wage Requirements for Service Contracts). **If the Offeror fails to submit and complete the Affidavit of Agreement, the State may determine an Offeror to be not responsible.**

Contractors and Subcontractors subject to the Living Wage Law shall pay each covered employee at least the minimum amount set by law for the applicable Tier Area.. The specific Living Wage rate is determined by whether a majority of services take place in a Tier 1 Area or Tier 2 Area of the State. The Tier 1 Area includes Montgomery, Prince George's, Howard, Anne Arundel, and Baltimore Counties, and Baltimore City. The Tier 2 Area includes any county in the State not included in the Tier 1 Area. In the event that the employees who perform the services are not located in the State, the head of the unit responsible for a State contract pursuant to §18-102 (d) shall assign the tier based upon where the recipients of the services are located.

The contract resulting from this solicitation will be deemed to be a Tier 1 contract or a Tier 2 contract depending on the location(s) from which the contractor provides 50% or more of the services. If the contractor provides 50% or more of the services from a location(s) in a Tier 1 jurisdiction(s) the contract will be a Tier 1 contract. If the contractor provides 50% or more of the services from a location(s) in a Tier 2 jurisdiction(s), the contract will be a Tier 2 contract. If the contractor provides more than 50% of the services from an out-of-State location, then the contract will be deemed to be a Tier 1 contract. The Offeror must identify in their Offer the location(s) from which services will be provided.

SECTION 3. MINIMUM QUALIFICATIONS

The following qualifications must be met to be considered:

The Offeror shall provide key personnel that have:

- A. A minimum of ten years experience with the CDBG program, including:
 - 1. Knowledge of the administration and monitoring of the CDGB program, preferably as administered by the State,
<http://www.jobzoneonline.com/events/FORTBELVOIRMARCH19RSVPLIST.htm>
 - 2. Knowledge of the administration of the Neighborhood Stabilization Program, and
 - 3. Knowledge of the changes to the Federal CDBG program that have occurred since 1996; and
- B. A minimum of ten years experience writing technical publications, reports, analyses, manuals, handbooks, etc. related to the CDBG program.

SECTION 4. SCOPE OF SERVICES

4.1 BACKGROUND

DHCD began administering and monitoring the CDBG program in federal fiscal year 1987. Prior to that time, the CDBG program was administered and monitored by the U.S. Department of Housing and Urban Development. The purpose of the CDBG program is to provide grants to local governments in support of economic development, housing, infrastructure and community service projects on behalf of the low and moderate income population. The Maryland CDBG program for non-entitlement communities funds approximately \$8 million of economic and community development projects throughout the State per year. In 2009 the State of Maryland received \$26,704,504 under the Neighborhood Stabilization Program (NSP). The NSP program was designed to stabilize communities across the State hardest hit by foreclosures. NSP is a component of the CDBG program. The CDBG regulatory structure is the platform used to implement the NSP program and the Guidebook should include basic NSP information.

Grantees and their sub-recipients share joint responsibility with the State of Maryland for carrying out the approved activities in conformance with applicable Federal requirements. Monitoring of the grantees confirms that the localities are in conformance with the Federal and State policies and procedures for CDBG funding and helps to ensure that the project will be delivered on time and on budget.

The Guidebook is intended to assist the CDBG staff, but more importantly, to act as a guide to localities who receive CDBG grants to help improve administration of CDBG and NSP projects by presenting the required procedures and examples of best practices in all areas of the program. The Guidebook also helps grantees and sub-recipients comply with the CDBG rules, achieve project objectives, and provide information and technical assistance.

4.2 SCOPE OF SERVICES

- A. Overview. The Contractor shall update and publish the CDBG handbook, *Keys to Success: A Guidebook for the Maryland Community Development Block Grant Program* (the Guidebook), including sample documents and checklists on administering CDBG grants. The Contractor shall ensure that updates and revisions of all Federal and State regulations and requirements to the CDBG Program since 1996 and the NSP Program are incorporated in the revised Guidebook
- B. Project Schedule. The Contractor shall develop and submit to Neighborhood Revitalization (NR) for approval a schedule for the updating, publishing, and delivery of the revised Guidebook.
- C. Update of Guidebook. The Contractor shall:
 - 1. Interview NR's CDBG staff regarding current CDBG guidelines.
 - 2. Review updates and revisions of all Federal and State regulations and requirements to the CDBG Program since 1996.
 - 3. Prepare a list of recommended changes/ updates to the current Guidebook, discuss the recommendations with CDBG staff, and submit the recommendations to NR for review and approval.
 - 4. Incorporate all approved changes/updates into the Guidebook, and submit a draft of the revised Guidebook to NR for review and approval.
- D. Publication and Delivery of Guidebook. The Contractor shall:
 - 1. Transmit to NR one copy of the final approved version of the revised Guidebook in electronic format, which is currently Portable Document Format and Microsoft Word and shall be as directed by NR. DHCD may post any and all deliverables under this contract, including the Guidebook, to DHCD's website: www.md.housing.org.
 - 2. Produce 150 hardcopies of the final approved version of the revised Guidebook, with sample documents and checklists on administering CDBG grants, on 8 1/2" x 11" paper, black ink, unbound, 3 hole punched, and shrink wrapped.

4.3 STAFFING PLAN AND KEY PERSONNEL

The Contractor shall maintain a staffing plan that describes the engagement team and identifies the specific individuals who will be assigned to the Contract to perform work under each of the tasks referred to in Section 4.2, including the key personnel of any subcontractor, such as those used to meet an MBE goal assigned to this Contract. The staffing plan shall include a description of the division of responsibility envisioned among these individuals.

Replacement of any personnel shall be with personnel of substantially equal ability, qualifications and experience and with the prior written consent of DHCD. DHCD will reserve the right to terminate the contract if key personnel are changed without such consent.

4.4 CONTRACT MANAGER

After contract award and throughout the course of the project, the Contract Manager listed below will schedule the Contractor's work, review the Contractor's work as it is submitted, and monitor the performance of the Contractor.

Anne Stringer
Division of Neighborhood Revitalization
100 Community Place
Crownsville, Maryland 21032
Phone: 410-514-7262
Fax: 410-514-7925
Email: Stringer@mdhousing.org

SECTION 5. PROPOSAL FORMAT

5.1 GENERAL

The Offeror's Technical Proposal should be prepared in a straightforward and concise manner, detailing the Offeror's capabilities to satisfy the requirements of this RFP and should conform to the Outline listed in Section 5.2.B below.

5.2 TECHNICAL PROPOSAL

A. General:

Offerors must submit, under separate cover, a clearly marked original and three (3) additional hardcopies of the Technical Proposal in a separate sealed envelope titled "Maryland CDBG Guidebook – Technical Proposal" and an electronic version of the Technical Proposal in MS

Word or PDF, submitted on a CD with a label on the outside that indicates the RFP number and title.

Offerors should include a transmittal letter on the Offeror's stationery, signed by an individual who is authorized to bind the firm to all statements in the proposal and the services and requirements as stated in the RFP.

B. Outline of sections to be included in the Technical Proposal:

Table of Contents

Tab 1 – Minimum Qualifications

The Offeror shall demonstrate that it meets the qualifications outlined in Section 3 by discussing the prior experience of the key personnel to be assigned by Offeror as it relates to the requirements of Section 3.A-B.

Tab 2 – Executive Summary

- A. The Offeror shall condense and highlight the contents of the Technical Proposal in a separate section titled "Executive Summary." The summary shall provide a broad overview of the Offeror's understanding of the contents of the RFP and of the how the Offeror's proposal meets the scope of services outlined in Section 4. If any addendum or amendments have been issued to this RFP, the Offeror shall acknowledge same in this section.
- B. Any exceptions to this RFP or the terms and conditions outlined in Attachment A or any other attachment must be clearly identified in this section. Exceptions may result in the proposal being rejected or being determined not reasonably susceptible of being selected for award.

Tab 3 – Required Submissions

- A. Bid/Proposal Affidavit (Attachment B) – completed and signed by an individual authorized to bind the Offeror. All questions are to be answered on Attachment B. If a question is not applicable please indicate so.
- B. MBE Form, Certified MBE Utilization and Fair Solicitation Affidavit (Attachment D-1 to Attachment D of the RFP) – completed and signed by an individual authorized to bind the Offeror. If the Offeror fails to complete and submit this form with the Technical Proposal as required, the Procurement Officer shall determine that the proposal is not reasonably susceptible of being selected for award.

C. Maryland Living Wage Requirements Affidavit of Agreement (Attachment E-1).

Tab 4 – Summary of Experience and Capability

- A. Prior Experience- Describe in detail selected engagements and experience of key personnel that demonstrate their ability to provide the services outlined for the respective activities in Section 4.2. Include specific experience in the area of policies and procedures of the CDBG program and the monitoring of CDBG grantees. The proposal should clearly state the number and identity of clients currently served for the activity area;
- B. Skills - Briefly detail the specific skills of key personnel, including the ability to explain, both orally and in writing, updates to the Guidebook; and
- C. Samples - Attach as an exhibit two samples of technical writing which highlights the Offeror's experience with writing technical publications, reports, manuals and handbooks.

Tab 5 – Staffing Plan and Key Personnel

- A. Provide a staffing plan that:
 - 1. Identifies the specific individuals who will be assigned to the Contract to perform work under each of the tasks referred to in Section 4.2, including the key personnel of any subcontractor, such as those used to meet an MBE goal assigned to this Contract;
 - 2. Specifies the division of responsibility envisioned among these individuals and their availability to perform contract services during the term of the Contract; and
 - 3. Identifies other personnel who would be available to perform the services described in Section 4.2, if members of the specific team were to be unavailable.
- B. Include a resume for each individual named.

Tab 6 - References

- A. References. Provide the names, addresses, telephone numbers, and email of at least three current clients of key personnel that may be contacted as references. Also provide at least one client relevant to CDBG work (this does not need to be a current client).

- B. State Contracts. Provide a list of all contracts with any entity of the State of Maryland that it is currently performing or which has been completed within the last 5 years. For each identified contract the Offeror is to provide in its Technical Proposal:
1. The State contracting entity;
 2. A brief description of the services/goods provided;
 3. The dollar value of the contract;
 4. The term of the contract;
 5. The State employee contact person (name, title, telephone number and if possible e-mail address); and
 6. Whether the contract was terminated before the end of the term specified in the original contract, including whether any available renewal option was not exercised.

The Procurement Officer or a designee may contact the identified State agencies or the most appropriate ones if many contracts are involved, to ascertain the Offeror's level of performance of State contracts.

Information obtained regarding the Offeror's level of performance on State contracts will be considered as part of the experience and past performance evaluation criteria of the RFP.

Tab 7 –Approach to Services, as described in Section 4.2

Describe the Offeror's approach for the engagement including, but not limited to, the following:

- A. Approach to be taken to gain and document an understanding of the current CDBG guidelines and Guidebook;
- B. Approach to be taken in determining Federal and State regulations and requirements to the CDBG Program since 1996; and
- C. Tentative schedule for completing the project.

Tab 8 – Economic Benefit to the State of Maryland

- A. Describe the benefits that will accrue to the Maryland economy as a direct or indirect result of the Offeror's performance of the contract resulting from this RFP.

Economic Benefits include:

1. The Contract dollars to be recycled into Maryland's economy in support of the Contract. Offerors should be as specific as possible and provide a breakdown of expenditures in this category.
2. The number and types of jobs for Maryland residents resulting from this Contract. Indicate job classifications, number of employees in each classification, and the aggregate payroll to which the Offeror has committed.
3. Tax revenue to be generated for Maryland and its political subdivisions as a result of this contract. Indicate tax category (e.g., payroll taxes, sales taxes). Provide a forecast of the total tax revenue resulting from this contract.

- B. In addition to factors listed above, explain any other economic benefits to the State of Maryland that would result from the Offeror's proposal.

5.3 PRICE PROPOSAL

Offerors must submit a clearly marked original and three (3) copies of the Price Proposal in a separate sealed enveloped titled "Maryland CDBG Guidebook - Price Proposal." The Price Proposal shall be submitted on the Price Proposal Form, Attachment F, and signed by an official authorized to bind the Offeror.

SECTION 6. EVALUATION PROCEDURE AND CONTRACT AWARD

6.1 EVALUATION COMMITTEE

The Procurement Officer shall establish an Evaluation Committee, which may include individuals from within or outside of State government. The Procurement Officer reserves the right to reject, in whole or in part, any and all proposals received as a result of this RFP, to waive minor irregularities in proposals, and to enter into discussions with all responsible offerors in any manner deemed necessary to serve the best interest of DHCD and the State. Offerors whose proposals are not accepted will be notified in writing.

6.2 DISCUSSIONS/ORAL PRESENTATIONS

All Offerors who appear to be responsible and whose proposals are initially classified as being reasonably susceptible of being selected for award (or potentially so) may be required to make oral presentations of their proposals to, and participate in discussions with, the Evaluation Committee. Offerors will be notified as to a date for oral presentations/discussions. Offerors must confirm in writing any substantive oral clarification of their proposal made in the course of discussions and all written clarifications will become part of the Offeror's Technical Proposal.

Price Proposals from only those responsible Offerors whose proposals are finally deemed reasonably susceptible of being selected for award will be opened following the discussion and presentation process.

If following the opening of the price proposals, the Procurement Officer determines that further discussion is in the best interest of DHCD and the State, the Procurement Officer will notify all of the Offerors of the date on which such discussions will be conducted. Upon completion of all discussions and upon receipt of any "best and final offers" submitted as a result of such discussions, the Evaluation Committee shall recommend to the Procurement Officer the award of the Contract to the responsible Offeror whose combined technical and price proposal is determined to be the most advantageous to DHCD and the State.

6.3 TECHNICAL PROPOSAL EVALUATION CRITERIA

The Evaluation Committee will conduct their evaluation of the Technical Proposals received on the basis of the following criteria in descending order of importance:

- A. Experience and Capability, as described in, Section 5.2, Tabs 2, 4 and 6;
- B. Staffing Plan and Key Personnel, as described in Section 5.2, Tab 5;
- C. Approach to Services, as described in Section 5.2, Tabs 7; and
- D. Economic Benefits, as described in Section 5.2, Tab 8.

6.4 PRICE PROPOSAL SELECTION CRITERIA

Price Proposals will not be opened until the evaluation of the Technical Proposal is complete. The Price Proposal evaluation will be based upon the prices submitted by the Offeror on Attachment F – Price Proposal Form, and best and final offers, if any. Proposals will be ranked in order from lowest to highest cost to the State.

6.5 WEIGHTING OF TECHNICAL AND PRICE PROPOSALS

The Technical Proposal will have more weight than the price proposal in determining the most advantageous offers.

6.6 CONTRACT AWARD

DHCD intends to award a single contract. Contract award will be to the Offeror whose proposal is determined to be the most advantageous to the State and DHCD.